

Railroad Retirement Board

§ 217.5

PART 217—APPLICATION FOR ANNUITY OR LUMP SUM

Subpart A—General

Sec.

217.1 Introduction.

217.2 Definitions.

217.3 Need to file an application.

Subpart B—Applications

217.5 When an application is a claim for an annuity or lump sum.

217.6 What is an application filed with the Board.

217.7 Claim filed with the Social Security Administration.

217.8 When one application satisfies the filing requirement for other benefits.

217.9 Effective period of application.

217.10 Application filed after death.

217.11 “Good cause” for delay in filing application.

Subpart C—Filing An Application

217.15 Where to file.

217.16 Filing date.

217.17 Who may sign an application.

217.18 When application is not acceptable.

217.19 Representative of the claimant selected after application is filed.

217.20 When a written statement is used to establish the filing date.

217.21 Deterred from filing.

Subpart D—Cancellation of Application

217.25 Who may cancel an application.

217.26 How to cancel an application.

217.27 Effect of cancellation.

Subpart E—Denial of Application

217.30 Reasons for denial of application.

217.31 Applicant's right to appeal denial.

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Subpart A—General

§ 217.1 Introduction.

This part prescribes how to apply for an annuity or lump-sum payment under this chapter. It contains the rules for the filing and cancellation of an application and the period of time the application is in effect. Eligibility requirements for an annuity and for a lump-sum payment are found respec-

tively in parts 216 and 234 of this chapter.

[54 FR 13363, Apr. 3, 1989]

§ 217.2 Definitions.

The following definitions are used in this part:

Applicant means a person who signs an application for an annuity or lump sum for himself or herself or for some other person.

Application refers only to a form described in § 217.6.

Apply or *file* means to sign a form or statement that the Railroad Retirement Board accepts as an application.

Award means to process a form to make a payment. An annuity is awarded on the date the payment form is processed.

Claimant means a person who files for an annuity or lump sum for himself or herself or the person for whom an application is filed.

§ 217.3 Need to file an application.

In addition to meeting other requirements, a person must file an application to become entitled to an annuity or lump sum. Filing an application will—

(a) Permit a formal decision on whether the person is entitled to an annuity or lump sum;

(b) Protect a person's entitlement to an annuity for as many as 12 months before the application is filed; and

(c) Provide the right to appeal if the person is dissatisfied with the decision (see part 260 of this chapter).

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[47 FR 7647, Feb. 22, 1982, as amended at 52 FR 11017, Apr. 6, 1987]

Subpart B—Applications

§ 217.5 When an application is a claim for an annuity or lump sum.

An application is a claim for an annuity or lump sum if it meets all of the following conditions:

(a) It is on an application form completed and filed with the Board as described in § 217.6;